**Guidelines to complete a Bursary Transfer (BBT) document**

* **KFS navigation:** **Main Menu >** **Administrative Transactions** **>** **Financial Processing >** **Bursary Transfer**
* Open a new BBT document and **write down the Doc Nbr** in the document header on your original documentation.
* Use the Tab key on your keyboard between fields.

|  |  |  |
| --- | --- | --- |
|  | **Tab / Action** | **Fields to be completed** |
| 1 | Document Overview | * Description (Auto generated: Org code & name + Initiator’s surname & name) – do not type in this field!
* Explanation (optional)
* Click
 |
| 2 | Accounting Lines – **Expense** Section  | * Complete or  Chart Code
* Complete or  Account Number
* Complete or  Object Code
* Complete Amount
* Complete Line Description
* Click  and ensure the line is numbered
 |
| 3 | Notes and Attachments | * Type your notes in the Note field
* Click on  to browse on your computer for the supporting documents (contracts etc.) you want to attach.
* Click
* Click
 |
| 4 | Ad Hoc Recipients (**Compulsory**) | * Click  and choose the  action
* Complete or  the person to add to the routing
* Click
 |
| 5 | Route for approval | * Click  at the bottom of the E-doc
 |
| 6 | Route Log | * To follow the progress and find out who is next in line to approve
* Click ***tinybutton-show*** in the Pending and Future Action Requests
 |
| 7 | Close the document | * Click  to close the document.
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